BEACON RESEARCH

Suite 3, The Resource Centre,
Bridge Street, Garstang,
Lancs. PR3 1YB.
Tel: 01995 606330
Fax: 01995 605336
Email: gurth@beaconresearch.idps.co.uk
VAT Reg No: 712347851

WOTTON SHOPPER SURVEY

Final Report

Prepared for: Stroud District Council and the towns of Stroud, Dursley, Nailsworth, and Wotton-under-Edge

Date: November 2006

1. INTRODUCTION / BACKGROUND.

Beacon Research in association with Colliers CRE were commissioned by Stroud District Council to undertake Annual pedestrian flow counts and Land use and vacancy assessments within the six market towns of Berkeley, Dursley, Nailsworth, Stonehouse, Stroud and Wotton-under-Edge and Shopper surveys in four of these towns; Dursley, Nailsworth, Stroud and Wotton-under-Edge.

The assessments provide an update to surveys and analysis, carried out by the agencies, in 2005, as part of the Stroud District Market Towns Study.

The following document represents our report on the survey of Town Centre shoppers in Wotton and is directly comparable to a similar survey undertaken in 2003.

A separate report has been issued on the pedestrian flow counts, land use and vacancy assessments.

2. RESEARCH OBJECTIVES.

The primary objective of the study was to examine visitor behaviour and attitudes in relation to shopping and parking in the Town Centre. Overall we sought to provide the following information.

- Shopper profiles.
- Main stores and centres used for food shopping
- Other centres used regularly for shopping within the area
- General shopper behaviour, reasons for visiting Wotton and mode of transport used.
- Rating of current town centre facilities and environmental features
- Usage of Public spaces
- Car parks used and rating of current car park facilities. Attitudes towards possible park and ride facility.
- General view of shopping and parking provision in the town and any desirable improvements.
- Usage and attitudes to visiting the town centre at night

3. RESEARCH METHODOLOGY.

A total of 150 shoppers were interviewed in the town centre during the period from 14th October to November 4th 2006. Interviews were conducted on Tuesdays and Saturdays

In order to provide the most accurate representation of shoppers visiting Wotton Town Centre, five different interview locations were used, as follows:

1. Top of the High Street
2. Swan Inn, Market Street.
3. Junction of Rope Walk / Long Street.
4. Junction of Clarence Rd / Long Street.
5. Junction of School Road / Church Street

These locations were rotated throughout the interview period, with one or more locations being used on each day. Within each location respondents were chosen at random amongst visitors who had completed their shopping.

Following a meeting with Council Officers, a draft questionnaire for the survey was prepared and subsequently agreed, prior to the commencement of fieldwork. A copy of this questionnaire is enclosed with the report.

4. <u>MAIN FINDINGS.</u>

The key results from this survey are summarised as follows:

4.1 The profile of shoppers interviewed would suggest that the town currently attracts shoppers that are slightly older than average and somewhat up market compared to the national average.

Almost 44% of shoppers are aged 55 or over and 42% are in the highest social groups.

4.2 Precisely 90% of shoppers visit the Town Centre at least once a week including 37% who visit everyday.

On average, the typical visitor makes 192 visits a year to the Town Centre, more than 3 visits per week

4.3 Just below a half (47.6%) of shoppers do **<u>not</u>** use any other Centre **in the area** on a regular basis.

The most popular alternatives to Wotton within in the area are Stroud (31.6%), Dursley (29.6%) and Nailsworth (18.1%).

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4.5 **Outside** the area the most popular centres visited regularly, are Cribbs Causeway (49%), Yate (43%) and Bristol (43%).

4.6 Shoppers choose to visit other centres both in and out of their area because of the good range of shops, both food and non-food

The choice and range of non food outlets is more important in choosing to visit centres **outside** the area

4.7 Almost a third (32.2%) of local shoppers do their main food shop in Wotton Under Edge Co-op. A further 17.7% use Tesco in Yate

A third of shoppers use the two main Wotton stores for their food shopping, whilst 26% choose the three Yate stores and 9.5% choose the main Stroud stores.

4.8 Safety and security in the town centre is described as good by almost 78% of shoppers (81% of those offering an opinion). Similarly, access on foot and by car, are generally good, but 48% of shoppers describe access by public transport as poor. The retail offer and range of services are good rather than poor but 25.6% of shoppers describe the Public Toilets as poor

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4.9 Less than half (44.5%) of all shoppers, believe that there are enough public spaces in the area. Having said that, 67.2% of respondents make no use, of any of the public spaces available locally.

4.10 Shoppers were also asked to describe the environment of the town on key features, using the words Good, Average or Poor

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On all the features there are only a minority of shoppers who describe any as poor. In most cases over 65% describe them as good or average. In particular, the feeling of security, the cleanliness and the internal and external signage are both seen as good and 67.6% of shoppers describe the overall attractiveness of the town centre as good

4.11 Public toilets and Street cleaning would be the most popular improvements to the town centre, ahead of more seating and more planting.

Almost 80% of shoppers were able to nominate at least one possible improvement.

4.12 Over half (53.6%) of those interviewed and 77% of those aged 16-34 said that they visit the town at night.

Socialising and meeting friends is the most popular reason for visiting the town centre although all three activities are enjoyed by significant numbers

Where people do not use the town centre at night this is likely to be because they don't go out at night or because of distance rather than any feeling of being unsafe

4.13 Almost three quarters (71.7%) of those interviewed said that their main reason for being in Wotton was to shop for goods. This includes 54% shopping for food. A further 10.9% work in the Town and 5.1% were paying bills / visiting services.

4.14 The majority (82.5%) of shoppers intended to stay no more than two hours in the town, including 62.4% staying an hour or less.

The average dwell time was 93 minutes

4.15 On average, shoppers in the Town Centre, spent £20.60. This increases to £24.37 on Saturday.

However since 9.4% of shoppers spent nothing, the actual average amongst spenders is £22.70. Almost 40% of shoppers spent more than £20 during their visit

4.16 Over 52% of visitors to the Town Centre travelled by car, but almost as many (45.3%) walked
Amongst car borne shoppers, the Chipping car park was the most popular car park, by some considerable margin, ahead of the Coop.

Over 69% of all motorists used the Car Parks, whilst a further 29.3% parked on the street.

4.17 Over 90% of car borne shoppers say that free parking is important to them in choosing to visit Wotton.

Perhaps because of this, only 35.3% were prepared to consider taking shuttle bus to the centre of the town

4.18 Again, only 37.4% of car borne shoppers say that they are willing to consider other forms of transport for travelling to Wotton

The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (80%). This reflects the opinions expressed earlier in **4.8** regarding access by public transport.

4.19 When asked about local parking, the amount of car parking spaces and on-street parking spaces is regarded as poor rather than good. Location, design and safety in car parks are all good or average and very few shoppers could comment on service

The most popular improvement to local parking would be more car parks

5. DETAILED FINDINGS.

In this section of the report, we provide a more detailed analysis of the results, together with extracts from the tabulations, where appropriate.

5.1 Shopper Profile

The profile of visitors to the Town Centre is slightly older than average and somewhat up market compared to the national average. Whilst the Tuesday and Saturday profiles are slightly different, the base samples are too small comment on their significance

Almost 44% of shoppers are aged 55 or over and 42% are in the highest social groups.

		%
AGE	16-24	8.1
	25-34	6.7
	35-44	20.1
	45-54	21.4
	55+	43.7
	Refused	-
SEX	Male	29.3
	Female	70.7
SOCIAL GRADE	AB	41.6
	C1	33.6
	C2	13.4
	DE	10.2

Note: In broad terms AB = professional and managerial occupations,
C1= Clerical
C2 = Skilled Manual
D = Unskilled Manual
E = Dependent on State benefits

Only 38% of shoppers work in the area, and amongst this group, the majority work in Wotton. (Note: The base for these figures is all shoppers, which includes those, not in employment)

Area of Work	%		%
Stroud	1.8	Stonehouse	-
Dursley	3.6	Berkeley	1.8
Wotton	76.6	Ebley	-
Nailsworth	-	Elsewhere	16.2

5.2 General Shopping Habits

In this section of the report we deal with general shopping habits of visitors to Wotton Town Centre.
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5.2.1 Frequency of Visiting Wotton

Precisely 90% of shoppers visit the Town Centre at least once a week including 37% who visit everyday.

On average, the typical visitor makes 192 visits a year to the Town Centre, more than 3 visits per week.

	%
Everyday	37.0
4-5 times a week	15.5
2 – 3 times a week	24.8
Once a week	12.7
Once a fortnight	2.0
Once a month	2.0
Less Often	6.0
Average	**192 visits per year**

Frequency of use seems to be reasonably similar across all the different demographic groups. However, weekday visitors are marginally more frequent users than those interviewed on Saturday.

5.2.2 Other Town Centres regularly used in / outside the area

Just below a half (47.6%) of shoppers do **not** use any other Centre in the area on a regular basis.

The most popular alternatives to Wotton within in the area are Stroud (31.6%), Dursley (29.6%) and Nailsworth (18.1%).

	% in area using regularly
Stroud	31.6
Dursley	29.6
Nailsworth	18.1
Berkeley	4.0
Stonehouse	2.7
None of these	47.6

Outside the area the most popular centres visited regularly, are Cribbs Causeway (49%), Yate (43%) and Bristol (43%)

	% outside area using regularly
Cribbs Causeway	49.0
Yate	43.0
Bristol	42.9
Gloucester	22.1
Thornbury	20.1
Cheltenham	14.1
Cirencester	10.7
Swindon Town centre	4.0
Swindon Outlet Village	1.3
Tewkesbury	0.7
None of these	15.5

These figures quite clearly demonstrate that the centres outside the local area are the genuine alternatives to shopping in Wotton. Less than 16% of Wotton shoppers do not visit at least one of these centres on a regular basis

5.2.3 Why Choose Other Centres

Shoppers choose to visit other centres both in and out of their area because of the good range of shops, both food and non-food.

	In Area %	Out of Area %
Close to home / Convenient	12.8	8.2
Close to work / Convenient	1.3	8.2
Good range of food shops / specialist shops	46.2	41.0
Good range of non-food shops	38.5	66.4
Good range of services (Post Office, Bank etc)	2.6	7.4
Good range of places to eat and drink	3.9	7.4
Easy to get to by car	5.1	6.5
Easy to get to by public transport	2.6	2.4
Cheap /easy to park	2.6	8.2
Friend/ relative lives there	10.2	4.1
Other	32.0	20.5

The choice and range of non food outlets is more important in choosing to visit centres **outside** the area

5.2.4 ***Main Centre- Food Shopping***

Almost a third (32.2%) of local shoppers do their main food shop in Wotton Under Edge Co-op. A further 17.5% use Tesco in Yate.

	%
Wotton Under Edge Co-op	32.2
Wotton Under Edge Tesco	0.7
Yate, Tesco	17.5
Yate, Morrisons/ Somerfield	6.0
Yate, Lidl	2.0
Stroud, Watrose	4.7
Stroud, Sainsbury	2.7
Stroud, Tesco	2.0
Internet	2.7
Cam, Tesco	6.1
Cribbs Causeway, Asda	2.0
Cribbs Causeway, Morrisons	1.3
Nailsworth, Somerfield	2.0
Local Village Shop	1.3
Other	16.6

A third of shoppers use the two main Wotton stores for their food shopping, whilst 26% choose the three Yate stores and 9.5% choose Stroud. The Other category is likely to include smaller Wotton food stores

5.2.5 ***Rating of the Town Centre – Retail and facilities***

Shoppers were asked to describe the local retail offer and key facilities, using the words Good, Average or Poor. The results are summarised as follows:

	Good %	**Average %**	**Poor %**	**DK / NA**
Choice and quality of Non-Food shops	48.9	32.9	15.5	2.7
Choice and quality of Food Shops	49.6	39.0	8.1	3.3
Range of Services (e.g. Bank)	49.6	33.6	12.1	4.7
Public Toilets	12.7	28.8	25.6	32.9
Accessibility by public transport	8.0	9.4	47.7	34.9
Accessibility by car	42.9	31.6	16.1	9.4
Accessibility by foot / cycle	62.3	23.6	5.3	8.7
Security/personal safety	77.7	17.5	4.7	0.7

Note: DK/ NA includes those offering no opinion on a feature or service. This may be because they never use a service, do not have a car, or the town does not have that feature

Safety and security in the town centre is described as good by almost 78% of shoppers (81% of those offering an opinion). Similarly, access on foot and by car, are both generally good, but 48% of shoppers describe access by public transport as poor. The retail offer and range of services are good rather than poor but 25.6% of shoppers describe the Public Toilets as poor.

When asked, which types of retailers, services or products they would like to see in Wotton over 85% of shoppers, were able to make at least one suggestion.

	%
None / cant think of any	14.7
Greater choice of clothes / shoes	39.0
More chain stores	6.1
More specialist stores	12.7
More food shops	10.8
More places to eat / drink	12.7
Public toilets	8.1
Baby changing and feeding area	2.0
Street entertainment	1.3
More Police	20.8
More leisure/entertainment facilitie (e.g. cinema, gym etc)	4.7
Other	16.1

The first point to make is that a very high proportion of respondents were able to nominate potential additions to the retail mix. In normal circumstances at least half of those interviewed claim that they are quite happy with the current situation.

Secondly, it is very clearly evident from the response that the most critical shortfall in the local retail offer is in the area of clothes and shoe stores, mentioned by 39% of shoppers. A further 13% mentioned more specialist stores. In terms of services, more Police was the main priority

5.2.6 <u>Public Spaces</u>

Less than half (44.5%) of all shoppers, believe that there are enough public spaces in the area. Having said that, 67.2% of respondents make no use of any of the public spaces available locally.

Public Spaces used	**%**
None	67.2
Wotton - Bluecoat School	4.7
Wotton - Synwell Lane	6.7
Wotton - Playing field / Park (unspecified)	4.0
Chipping Green, Wotton	8.7
Other- Wotton	8.9

The main uses made of public spaces are ‘Take children to play’ ‘walk’ and ‘Exercise the dog’

5.2.7 Rating of the Town Centre – Environment

Shoppers were also asked to describe the environment of the town on key features, using the words Good, Average or Poor
The results are summarised as follows:

	Good %	Average %	Poor %	DK / NA
Cleanliness	40.2	46.8	12.9	*
Seating areas and benches	15.3	39.5	26.6	18.5
Amount of litter bins	24.1	34.7	21.8	19.3
Overall Attractiveness	57.1	36.4	6.5	*
Feeling of security	67.6	27.5	4.0	0.8
Signage (to and from town centre)	37.1	30.7	3.2	29.0
Signage (in around town centre)	36.3	30.8	4.8	28.2
Lighting	37.9	35.4	10.5	16.2

Note: DK/ NA includes all those offering no opinion on a feature. This may be because they never use the feature, or the town does not have that feature

On all the features there are only a minority of shoppers who describe any as poor. In most cases over 65% describe them as good or average. In particular, the feeling of security, the cleanliness and the Internal and external signage are all seen as good and 67.6% of shoppers describe the overall attractiveness of the town centre as good.

5.2.7 Improvements to the Town Centre – Environmental

Finally, shoppers were asked what improvements to the environment of the town centre they would like to see.

	%
None / DK / Cant think of any	18.7
Public / toilets / Street cleaning	35.7
More seating areas and benches	23.5
More Planting	23.5
More Litter Bins	14.1
CCTV	18.2
More facilities for the disabled	7.4
Other	19.5

Note: None /DK includes all those unable to make any suggested improvements.

Public toilets and Street cleaning would be the most popular improvement, ahead of more seating and more planting.

Almost 80% of shoppers were able to nominate at least one possible improvement.

5.2.8 The Town Centre at night

Over half (53.6%) of those interviewed and 77% of those aged 16-34 said that they visit the town at night.

Main reason for visiting	**%**
To socialise	61.2
To visit places to eat/drink	40.0
To visit leisure/entertainment facilities	37.5
Other	17.5

Socialising and meeting friends is the most popular reason for visiting the town centre although all three activities are enjoyed by significant numbers

Where people do not use the town centre at night this is likely to be because they don't go out at night or because of distance rather than any feeling of being unsafe.

	%
I don't go out in the evenings	49.3
Too far away from home	26.0
Feels unsafe	7.2
Lack of public transport, Not enough cultural activities Nothing for my age group	7.3
Other	14.5

5.3 About this Visit

The following comments relate specifically to the shopping trip undertaken at the time of interview

5.3.1 Reason for Visiting Wotton

Almost three quarters (68.7%) of those interviewed said that their main reason for being in Wotton was to shop for goods. This includes 54% shopping for food. A further 10.9% work in the Town and 5.1% were paying bills / visiting services.

	Main reason %	**Other reason %**
Food shopping (Supermarket)	38.3	11.4
Food shopping (Other)	15.9	16.1
To shop for non-food goods	14.5	26.8
Work here	10.9	-
Pay bills / visit services	5.1	8.8
Visiting places to eat or drink	1.4	5.4
Visit Doctor / Optician / Chemist	-	3.4
Meet friends / Relatives	2.9	4.7
Other	10.8	23.0

On Saturday, the numbers shopping for goods increases to 80%.

Similarly, the ‘other’ reasons given for being in Wotton were dominated by shopping for goods, although 8.8% were paying bills / visiting services.

5.3.2 Length of visit

The majority (82.5%) of shoppers intended to stay no more than two hours in the town, including 62.4% staying an hour or less. The average dwell time was 93 minutes.

	%
Less than 30 minutes	23.5
30 minutes to 1 hour	38.9
1 – 2 hours	20.1
2 – 3 hours	4.7
3 – 4 hours	4.7
4 – 8 hours	2.7
8 hours or more	5.4
Average Visit	**92.8 mins**

5.3.3 ***Average Spend***

On average, shoppers in the Town Centre, spent £20.60. This increases to £24.37 on Saturday.

Amount Spent	%
Nothing	9.4
Less than £10	29.0
£10 - £19.99	22.1
£20 - £49.99	30.8
£50+	8.7

However since 9.4% of shoppers spent nothing, the actual average amongst spenders is £22.70. Almost 40% of shoppers spent more than £20 during their visit

5.3.4 ***Mode of transport***

Over 52% of visitors to the Town Centre travelled by car, but almost as many (45.3%) walked.

	%
Car – Driver	49.8
Car – Passenger	2.4
Bus	2.4
Walked	45.3

This pattern is reasonably typical of a Town the size of Wotton although we might have expected more bus passengers and fewer shoppers walking into the centre. This may indicate that the catchment area for the Town is relatively small.

5.4 Parking

A number of questions were asked specifically of car borne shoppers which related to car parking and car parking charges.

5.4.1 ***Parking Location***

The Chipping car park was the most popular car park, by some considerable margin, ahead of the Coop.

	%		%
Car Park – Chipping	49.2	Car Park– Coop	15.4
Car Park – Civic Centre	3.1	On the Street	29.3
Car Park – Potters Pond	1.5	Dropped off	1.5

Over 69% of all motorists used the Car Parks, whilst a further 29.3% parked on the street.

5.4.2 Free Parking / Park and Ride

Over 90% of car borne shoppers say that free parking is important to them in choosing to visit Wotton.

	%
Very Important	73.9
Quite Important	16.9
Not very important	9.2
Not important at all	*

Perhaps because of this, only 35.3% were prepared to take a shuttle bus to the centre of the town

5.4.3 *Alternative Transport*

Once again, only 37.4% of car borne shoppers say that they are willing to consider other forms of transport.
The overwhelming reason for rejecting any alterative to the car is that "*Buses are inconvenient*" (80%)

5.4.4 Rating of Car Parks – Key Features

All shoppers were also asked to describe local car parking on a number of key features, using the words Good, Average or Poor
The results are summarised as follows:

	Good %	Average %	Poor %	DK / NA
Amount of on-street parking spaces	19.4	31.5	40.4	8.7
Amount of car parking spaces	18.0	29.5	42.4	10.1
Price of Council car parks	27.1	*	2.1	70.8
Frequency of patrols in Council car parks	0.7	0.7	5.8	92.8
Friendliness and helpfulness of staff in Coun car parks	0.7	*	2.2	97.1
Location	46.5	37.9	6.1	9.5
Design / layout	27.4	41.0	14.8	16.7
Safety / Security	30.8	36.8	8.5	21.9
Quality of service	1.4	4.3	2.2	92.1

Note: DK/ NA includes all those offering no opinion on a feature. This may be because they never use the feature, do not have a car, or the town does not have that feature.

The amount of car parking spaces and on-street parking spaces is regarded as poor rather than good. Location, design and safety are all good or average and very few shoppers could comment on service

5.4.5 ***Improvements to Car Parks***

All shoppers were finally asked what improvements were needed to local car parks.

	%
DK / Cant think of anything	36.0
More Car Parks	47.0
More / better disabled parking	3.4
Free / cheaper parking	5.5
Other	20.4

The most notable requirement is for more Car Parks, mentioned by 47% of shoppers. The small numbers mentioning cheaper / free parking are, presumably amongst those not aware of the current situation.

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